

# Rethinking Printing

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## Executive summary

The Rethinking Printing Report, conducted by Loudhouse Research on behalf of Kyocera, examines UK workplace printing attitudes and behaviours in 2010. Following on from previous research conducted in 2007 and 2008, it provides a view of the impact of the recession on printing behaviour, how environmental attitudes have evolved and in what ways businesses are choosing to respond.

The 2008 report highlighted the prominence of environmental issues among workers and in the media, and found employers adopting a somewhat haphazard approach to addressing their concerns. There were hints that in order to achieve a 'greener' printing future, the burden might need to be shifted away from employees toward a more regulation-driven corporate approach.

This year's Rethinking Printing research reinforces this need: with signs of 'green fatigue' amongst consumers and net increases in amount of workplace printing, the onus now has to shift to companies, who must automate where possible while still encouraging employees to think twice about unnecessary printing.

Alongside the continuing drive for environmentally preferable behaviours, several other factors suggest that in 2010 there is an increasingly strong business case for Managed Print Services (MPS). With organisations placing a greater-than-ever focus on cost, and printer management an evident burden on IT departments, the clear and tangible benefits of MPS represent an 'easy win' for IT departments.

### Green Fatigue?

Office workers remain concerned about environmental issues. Indeed, they tend to perceive themselves as more environmentally conscious than their employers. However, levels of concern seem to have fallen from a peak reached in 2007-8. Overall levels of concern about the environment are down from 77% in 2008 to 63%, with the greatest decline seen in the least tangible issue: climate change (down to 50% from 65%).

The harsh realities of economic turbulence have forced concerns about the environment to take a back seat. Whether this a temporary adjustment or a long-term trend remains to be seen, but in 2010 there are clear signs of green fatigue setting in at an individual level.

## Key Stats Summary

**63%** of office workers consider themselves environmentally responsible

**37%** of workers have increased the amount of printing they do in the last year

Workers print **10,000** sheets a year on average, of which **6,800** are wasted or unnecessary

Only **24%** of companies have a formal, written print policy

**34%** of IT time is spent dealing with printer issues

**60%** have audited their print services in the past year

**59%** either have MPS or intend to in the next

At the same time, employers are keen to stress their own concern for the environment, with 67% claiming that they make environmentally conscious decisions at work. The recession does not seem to be impeding progress towards their drive towards 'greening' the workplace, with most (62%) saying it has had little or no impact on their plans, and a further 25% saying the downturn has forced them to look at more environmental measures in order to cut operational costs.

One of the biggest challenges for employers hoping to push through environmental measures in the printing sphere is not getting it on the agenda, but encouraging users, in the face of their evident needs, to reduce the amount they print with 29% conceding that this is an issue. Coupled with this, some companies are also finding it difficult to enforce environmental policies via network rules (29%, up from 24% in 2008).

### **The 'Death of Paper': Still Greatly Exaggerated**

Employers are right to be concerned about their employees' entrenched printing habits. Despite the much-trumpeted rise of tablet/ mobile computing, and the ever-present rumour of the impending paperless office, office workers are printing as much as ever, with no signs of an imminent change. 40% continue to describe themselves as 'paper people' and a similar amount (39%) admit they could do more to reduce their printing.

In the last 12 months, little more than a fifth (22%) of office workers claim to have reduced their printing. 37% have actually increased the amount of printing they do, and 40% have made no change. The net result of this is that the average office worker prints as many as 10,000 sheets of paper in a year (45 per day). Of these, around 6,800 sheets can be considered as wasted or unnecessary. There is a clear disconnect between employees' apparent (though falling) environmental concern and their unwillingness to make changes in their workplace printing behaviour.

### **Corporate responsibility**

Printing policy in most organisations tends to be either absent, or leaning towards 'advice' rather than regulation. 46% of companies have 'loose guidelines relating to printing' in place, against only 24% who have a formal written policy.

Despite 78% of employees believing that the ultimate responsibility for reducing printing falls with the individual, they are reluctant to make these changes. Living in a largely rule-free environment (in which, for example, 76% print personal documents in the workplace), they are disinclined to make the effort to change their own behaviour with neither carrot nor stick to encourage them to do so.

Of the 6,800 sheets wasted by an employee in the average year, around 2,100 can be attributed to printing single-sided rather than double-sided. Of all kinds of print wastage, this is the issue that employees are most likely (41%) to believe could be solved by corporate intervention, whether by laying down firmer rules or by implementing automation.

In general though, employees seem happy to maintain the status quo of regulation-free printing, in which they accept responsibility but fail to change their behaviour. In this sense, there seems to be some conflict with the belief expressed by IT managers that 'user education around cost benefits' (68%) is the ideal way to encourage best practice printing. Only 27% of managers consider that enforced mandates are an effective solution, but a middle ground of managed automation and clearer rules may be the only way to influence users to change behaviour which seems increasingly set in its ways.

### **Managed Print Services**

Cost savings are the primary driver of IT investment in 49% of companies, and at least an important consideration for 76%. As well as the materials drain caused by unnecessary printing, employers estimate that over a third of IT departments' time (34%) is devoted to supporting printing services. It is not surprising therefore that 71% of IT managers believe that the efficiency of their printing set-up could be improved. With cost and efficiency clear priorities for businesses, and evidence of huge drains on both, solutions from outside the business are increasingly being sought.

51% of IT managers say that Managed Print Services are becoming an increasingly important aspect of IT planning and activity. A fifth (21%) of business have already adopted a Managed Print Service, and 59% either have one, or intend to have within the next 12 months. Alongside this, 60% of companies claim to have conducted an audit of their print services within the past year, suggesting that a high number of those undertaking audits are recognising the benefits of MPS.

Perhaps unsurprisingly, the most compelling benefit of MPS in the eyes of IT managers is cost savings (56%), but greater efficiency also scores highly (49%). Awareness of MPS is high, with an impressive 69% claiming to have at least a 'good understanding' of the concept.

With workers full of good intentions, but seemingly unwilling to regulate their own behaviour, and the range of other issues faced by day to day management and maintenance of printers, it is clear that the options for external management, regulation and automation offered by MPS is becoming an increasingly attractive option to businesses.

*The research was conducted in April 2010 by Loudhouse Research, an independent market research consultancy based in the UK. The report is based on responses from 1000 office workers and 200 IT managers in medium to large enterprises in a range of vertical sectors (500+ employees) in the UK.*